

Minutes

❖ Welcome, introductions, housekeeping announcements, choose a note-taker (Jess)

Roberta volunteered to take notes.

Ken shared Authority Maintenance schedule and document outlining what we can and can not do during this time.

❖ E-Library display issues (see also Agenda Screenshots attachment)

- Icons—what's up with them? (example: search for "sound recording cd" in FCL's eLibrary) How can we be more consistent? **(Janice, Jess; see also 2 E-Lib Format Icons attachments)**

Icons in eLibrary are generated by the item type of the first item attached to a bib record. The icons live in each libraries environment file on the server, so this could be customized by each library. This could become problematic for sharing group's patrons because each library could have a different icon for the same item type. Mike gets the icons from Google, so they are all able to be changed. Some icons that are problematic are Audio-recording (currently showing a cassette tape, when they are actually mostly CD's) and Video-recording (showing a VHS tape when the actual item in a DVD). Libraries need to be aware that these icons are generated by the item type that they choose. Mike mentioned that we do not have to have the icons, but then there would not be any indication of item type on the results list. Several people mentioned that they liked the icons, they just wanted to refine them so that they are more meaningful. Ken mentioned that new item types are not being added at this point, but that they are not able to be deleted even if they no longer have any items attached. There seem to be many different things within the system tied to these item types that aren't readily apparent. It was suggested that this group really look at Audio-recording and Video-recording and make some suggestions for what item type should be used by the entire catalog. A recommendation will be made to the Executive Committee by the Spring Membership Meeting.

- Multiple URLs in a single catalog record **(Roberta)**

Tori Koch from the Billings Medical Clinic contacted Roberta about a display issue with records with multiple URL's. The display seems to be different on every computer that is used. With multiple URL's there needs to be a way for all of them to display. This will become more of an issue as more and more journals become electronic only and libraries have different subscriptions for them. Even records with 3 URL's do not display correctly. Looking at these display issues also brought up the issue of needing to change the 856 first indicator from a 4 to a 7 after the record is brought into Workflows (OCLC will not allow you to save a

record with an 856 7* if you do not have the associated subfield in the 856). Mike asked for an e-mail detailing the display issues with the journal and the journal ISSN. He will open an incident with Sirsi about this.

➤ Call number **(Jess, Roberta)**

Jess was contacted by a librarian who stated that she felt that the call number was hard to locate in the new eLibrary display. A few others have heard similar complaints. The red Current Holdings was added after a few complaints and seems to help some. Suzanne said that her students are missing the call number constantly even with the Current Holdings. Mike said that he could change the font size, color, or bolding of the font. Amy M. asked if we could move the holdings information up to the top of the screen. Mike said that this was not possible. Roberta asked if the call number can appear on the results page. Mike said that this is still the same issue where it will pull the first call number associated with the bib, not the specific library that they are searching. Similar to what happens with the icons. This is not something that can be customized for each library. Mike will make a few changes on the test server and we can see what it looks like and then ask the membership what they want to do. Roberta suggested that in the future when we have a major change like this that we get some screenshots of the old display so that we can see what things looked like previously.

➤ Other issues of concern, comments?

Roberta asked if it was possible to display the holdings information on the Catalog record display. Mike asked that this be included in the e-mail to him regarding display issues, but he did not think it could.

❖ **Catalog use brochure**

Bridgett asked us to look over the brochure and give her feedback on what needed to be included.

❖ **Nitty-gritty cataloging stuff**

➤ Standardizing title control numbers **(Janice, Jess, Ken)**

- Example: Parmly's acq title control numbers don't have a small "i" in front of the ISBN number. Those that come in from other sources do. Is this a problem?

Amy F. talked about the acquisition module and how it works. It was suggested that Amy do a training at the Spring Membership Meeting on the Acquisition Module and how great it is. Billings really likes using it. The question of Billings adding brief records without a small "i" does not seem to be a problem. The Title Control number is changed when the real bib is added.

- Update on how SmartPort & bibload reports look for matching records (and what we can do about it) **(Roberta, Jess)**

Roberta brought in a record that created a duplicate even though the record already in the system had an OCLC number in the 035. Ken opened an incident with Sirsi and their response was that because the title control numbers were different (existing record Auto generated, new record OCLC) they would never match. Roberta and Jess feel that we should change our bibload and SmartPort match rules to Match on Title Control number or indexed MARC tag. We can test this out before we ask everyone to make this change. It should help prevent more duplicate records.

- Indexing 655 (genre) & 653 (uncontrolled index terms) tags—why or why not? **(Dave)**

Everyone agreed that this should be done. Since we will be re-indexing after the LTI work this is the perfect time to do this. Roberta will compile a list of 65X fields and subfields for review by the group. It will go to Ken within the next week or two.

- 245 (title) tag **(Janice)**

- Display of some subfields only by keyword search or not at all

Everyone agreed that everything should be indexed for both keyword and browse searches.

- Indexing of subfields n (number of part/section of a work) and p (name of part/section of a work)

This will be added to the list of tags that need to be indexed from the 65X discussion above.

- 029 tags (these are designed to hold an “other system control number) **(Janice)**

- Can these and possibly others (938, 952, ...) be added to the junk tag file? **(Ken, Roberta)**

Ken will get Roberta a list of what is in the junktag file currently. Roberta will send out to the group and we can decide what needs to be added to that file to keep the catalog cleaner. Lois asked why we felt this was an issue now, when the same thing had been brought up last year and no one seemed to think it was an issue. Several people responded that there are just so many more records with multiple 029's, 938's and 952's that it is starting to get annoying. Roberta mentioned that she sees these tags when she searches eLibrary.

- Workflows item policy overload—who's in charge of reigning these in? **(Ken)**

Ken talked about the work that has already been done by the membership with standardizing circ policies. This in turn helped to reduce the number of item types in the system. We need to focus on Home Locations now and start to consolidate these. Lois mentioned that Home Locations are unique to most libraries and are related to physical areas and signage in the libraries. Everyone agreed that this is something that will take time and effort on the part of the whole membership. New libraries are given a list of things to choose from for item types and home locations. New ones are only being added when absolutely necessary. Suzanne asked if it would be possible to have a one page reminder of what is impacted by item types and home locations. Ken and Bridgett will work on this.

❖ **Lunch (delivered at 12:30)**

❖ **Cataloging mentor program (Ken)**

Ken showed the group the cataloging mentors portion of the MSC website. He mentioned that this whole page has not been updated since 2008. There are about 30 to 40 libraries that are not on this list at all and need to be added. We may need to start looking at this by library type, or location or by sharing group to better help libraries. Dave Shearer and Amy Marchwick will be added to this list. It was also suggested the Melody Condron be asked to serve as a mentor. Ken also talked about the need for the Client/Agent program. Several people thought it would be good if this went away. Marilyn suggested that Roberta present her Cataloging Made Simple (MLA 2010 and 2011) presentation for MSC members. This is a presentation on the basics of original cataloging. Ken will send out a list of new libraries that need to be added to this list. He also mentioned that the cataloging guidelines will need to be updated if we do remove the Client/Agent program.

❖ **Resource Description and Access (RDA)**

- Where the US is at with possible adoption, where Montana and the MSC are at (**Jess, Roberta**)

Jess mentioned that the timeline for a decision from the US libraries has shifted to a later date, possibly June or July. She wondered if the MSC should purchase a print copy of RDA. Paulette mentioned that you can see RDA records in OCLC by looking at the 040 tag and looking for RDA. One of the biggest changes in RDA is that everything is spelled out. This can cause issues with compact disc vs. compact discs by a cataloger. Paulette mentioned that CONSER is very far behind in doing anything with RDA and they need to get on board.

- Training possibilities—for CMC members & general membership? (**Jess, Roberta, Ken**)

Paulette suggested we find out what Lyrasis could do for training in the state. She also mentioned OCLC as a possible trainer. She has been attending webinars at UM-Mansfield Library on RDA. Megan Dazey, from UM, will be presenting at MLA during the Technical Services Interest group meeting about copy cataloging with RDA. There are also going to be a few sessions on RDA at the COSUGI conference.

- Purchase of the RDA print edition for MSC? **(Jess)**

It was suggested that the State Library should buy a copy for their professional development collection that anyone could then borrow.

- General Material Designator (GMD): how to handle? **(Paulette)**

Paulette mentioned that the GMD will no longer be used with RDA. We rely on the GMD a lot in the MSC. She sees 3 possible solutions. 1. Use the icons to designate what would have been in the GMD. 2. We can add it if we want in our local catalog. 3. Searching needs to be changed in the OPAC to accommodate this change. This brought up the question of where Sirsi is in the process. They were involved in the test period, but nothing has been put out yet on how they are going to deal with these records. ILS's will have to display AACR2 records and RDA records at the same time.

- Other questions/concerns?

❖ **Duplicate records—Plan of Attack!**

- How will we locate them?
- Can the process be safely automated?

We keep spending lots of money on cleaning up the catalog, but then every time we add a new library we get that same amount of duplicate records back in the system. What is the plan for reducing the number of duplicates? Can it be automated? Ken mentioned that he doesn't think that the automated process will retain tags for schools. He will look into getting a few quotes from vendors. Several of the people who worked on this last, liked the lists from certain new libraries. These were lists of bibs that did not match anything in the system so were added as new bibs. They felt these worked really well. This might be the way to continue on the future. Ken said we cannot start another cleanup until the MSC is fully staffed. It takes too much time to manage the temp workers to do it now.

❖ **Cataloging guidelines review**

- Add section on creating acquisition records?
 - Parmly's Amy Fugate would be a good reference

There needs to be some consistency in how brief bibs are entered, both for Acquisitions and for those added for circ. We will look at the brief bib section of the guidelines and incorporate the Acquisitions bibs there.

- Discuss section on call number analytics **(for reference, see 3 Call number analytic attachments)**

Jess created a sample document that could be incorporated into the guidelines. We used that as a place to start the discussion. Call number analytics cause problems with placing holds when libraries are not entering items consistently. Lots of discussion for various ways that we can get libraries to do this. Most important point is to show them how hard it is for a patron to place a hold on their items. Other issues introduced included the way labels are printed in Missoula requires no spaces between V.1, and dates need to be entered a certain way. Amy F. mentioned that in the acquisitions module there is a drop down list of analytics to use that creates consistency. Most of the group was not aware of this list and thought we should keep this in mind as we formulate the guidelines. Finally decided that the sharing groups need to get together with their member libraries and decide what they are going to use. Then those groups need to meet and come to a consensus on what to use that will then be taken to the membership as the guidelines. Sharing groups will be meeting over the next few weeks, so there should be a decision to this group by June on what the guidelines will be. There were also questions on whether or not Mike can change all the Vol's out there to V's using API.

Janice also mentioned the reverse problem of people using analytics when they shouldn't. This creates the same kind of problem with holds. Many people add V. to call numbers to designate the volume in a series when there really isn't a need to do this. It was suggested that they could add a public note with the number in the series or they could use a # instead of V.

- Flesh out Call sources bullet in SmartPort guidelines? **(Jess)**

Jess suggested that we flesh out this part of the guidelines because she has had a lot of questions about this recently. Everyone agreed that we should do that.

- Other necessary changes/additions?

❖ **Miscellaneous Questions (from Dave)**

- Who is deemed qualified/assigned to merge multiple records and is it clear to everyone that this is for the good of the consortium/patrons?

This group can merge records. We have a find it fix it policy. There are a few others who have been given this ability, but not many. Everyone can transfer their own items but only a few can transfer other libraries items.

- 020s (ISBN) for Ebooks—leave in print format records? Does it cause same problems as large type ISBNs in print format records (unintentional overlays)?

Some have been taking out, others have been adding a subfield Z before the ISBN's. Ken will check with Sirsi to see if the subfield Z keeps these records from being overlayed when a record with the same ISBN comes in.

- Updates of serial records—how often do folks compare MSC serial records to what's in OCLC to make sure the MSC records are up-to-date?

There isn't anything in the guidelines about this, it occurs more on a case by case basis as people have time.

- Who has final authority for procedural changes?

❖ Election of new vice-chair

Dave Shearer from Parmly Billings is the new vice chair with the promise of lots of help from those of us on the committee.

❖ Other items

Lois asked if anyone knew how ADA compliant eLibrary was. She said that the City of Bozeman is really cracking down on software and services that are not ADA compliant. The Sirsi sales rep is visiting Bozeman next week and Lois will ask him about this.

❖ Wrap-up, good-bye, and safe travels home!!